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BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

Order Instituting Rulemaking Regarding Policies,
Procedures and Rules for California Solar
Initiative, the Self-Generation Incentive Program
and Other Distributed Generation Issues.

Rulemaking 06-03-004
(Filed March 2, 2006)

**ASSIGNED COMMISSIONER'S RULING
REQUESTING COMMENTS ON INTERIM MARKETING AND
OUTREACH PLANS FOR THE CALIFORNIA SOLAR INITIATIVE**

This ruling provides interested parties in the above-captioned proceeding the opportunity to comment on a process for approval of interim marketing and outreach plans for the California Solar Initiative (CSI). Following comments on the approach set forth in this ruling, the Commission will address an interim marketing approval process through a Commission order in this proceeding.

Background

From the outset of this proceeding, the Commission planned to address marketing and outreach after preliminary, or Phase I issues, were resolved. The Phase II schedule for this proceeding indicates marketing and outreach plans will be addressed following examination of research, development and demonstration (RD&D) and low income/affordable housing incentive issues, currently slated for decisions in the second and third quarters of 2007.¹ The

¹ See "Assigned Commissioner's Ruling Revising Schedule for Phase Two," February 5, 2007.

Energy Division held a workshop on marketing and outreach in December 2006, but does not anticipate issuing a proposal on Marketing and Outreach until the second half of 2007, at the earliest.

As set forth in D.06-08-028, the program administrators² may spend 10% of total CSI funds on administration, which includes marketing and outreach. Furthermore, D.06-08-028 directed the program administrators to spend no more than 5% of their total funds on administration until marketing, outreach, measurement and evaluation issues were addressed in Phase II.

The program administrators currently have no guidance from the Commission on CSI marketing and outreach. As of January 1, 2007, the CSI is underway and there is an immediate need for the program administrators to perform some level of marketing and outreach functions now, in advance of more thorough direction on marketing and outreach later this year. Any marketing and outreach the program administrators perform in advance of interim or final Commission guidance is at risk for disallowance.

Interim Marketing and Outreach Plans

Given the need for some interim guidance to the program administrators for marketing and outreach in advance of more complete consideration of this issue by the Commission later this year, this ruling requests comments on a process whereby the PAs submit interim marketing and outreach plans to the Energy Division for approval through an Advice Letter process.

² The CSI program administrators are Pacific Gas and Electric Company, Southern California Edison, and the San Diego Regional Energy Office.

The process would be as follows:

1. Following comments on this ruling, the Commission issues an order with interim marketing and outreach guidance and directing the PAs to submit Advice Letters with interim marketing and outreach plans to the Energy Division within 10 days of the Commission order.
2. As directed, each PA submits an Advice Letter to the Energy Division with its interim marketing and outreach plan and a budget for activities in 2007 only. Each PA would update its interim plan by Advice Letter every six months, until a final marketing and outreach plan is adopted in this proceeding. Each interim plan can spend no more than \$500,000 annually. The plans should incorporate the following:
 - a. Each PA will conduct two training sessions per month aimed at installers. Invitations should be distributed to at least all those persons or organizations on the CSI, SGIP, and ERP databases, eligible installer lists, and the service list of this proceeding.
 - b. Basic marketing and collateral materials, in the form of program brochures, factsheets, and general customer education kits. The materials should be patterned after materials on the "GoSolarCalifornia" website.³ Energy Division will review the proposed materials submitted through the Advice Letter process and approve them or suggest modifications, in consultation with the assigned Commissioner. The materials must reference the PA's role in the CPUC CSI program, energy efficiency audit requirements and efficiency rebates, and the GoSolarCalifornia website.

³ www.gosolarcalifornia.ca.gov

- c. Each PA should distribute at least two bill inserts in 2007 to promote CSI, and at least one of these should target the residential and small commercial market. The proposed inserts should be included with the Advice Letter for Energy Division review and approval.
 - d. The PAs should coordinate on one monthly electronic newsletter that the PAs would issue jointly to update readers on new program tools and information, the current focus of PA implementation discussions, and methods for the public to submit suggested solutions on implementation concerns. The newsletters must be sent to all applicants in the SGIP, CSI, and ERP databases, to lists of registered sellers and installers, posted to the GoSolarCalifornia and program administrators' websites, and sent to the service list of this proceeding. Energy Division staff may recommend particular topics to be addressed.
3. In addition, the PAs have the option of including the following items in their interim plans, as long as they stay within the \$500,000 annual budget limit:
- a. A short video for the GoSolarCalifornia website (jointly funded by all program administrators) to walk interested applicants through the application process.
 - b. Applicant training webinars.
4. Energy Division will handle each PA's Advice Letter through the Commission's standard advice letter process, in consultation with Assigned Commissioner, and either grant approval or modify the interim plans accordingly.
5. The program administrators should submit semi-annual expense reports to the Director of the Energy Division regarding interim marketing and outreach expenses. The reports should separately delineate marketing and outreach from other administrative

expenses so Energy Division can track the various categories of administrative expenditures.

Therefore, **IT IS RULED** that:

1. Parties may comment on the process for approval of interim marketing and outreach plans as set forth in this ruling no later than April 10, 2007.
2. Parties may submit reply comments no later than April 16, 2007.

Dated April 3, 2007, at San Francisco, California.

/s/ MICHAEL R. PEEVEY

Michael R. Peevey
Assigned Commissioner

INFORMATION REGARDING SERVICE

I have provided notification of filing to the electronic mail addresses on the attached service list.

Upon confirmation of this document's acceptance for filing, I will cause a copy of the Notice of Availability to be served upon the service list to this proceeding by U.S. mail. The service list I will use to serve the copy of the Notice of Availability is current as of today's date.

Dated April 3, 2007, at San Francisco, California.

/s/ FANNIE SID

Fannie Sid